

PANTHERSOFT RUNNING REPORTS/PROCESSES

Run Control ID

The first time a report/process is run in PantherSoft, a **Run Control ID** must be established. The Run Control ID is simply an identifier so that PantherSoft can recognize which report/process is being run. In this example, we will run a General Ledger Summary Report.

Run Control ID:

←

On the **Add a New Value** tab, click in the **Run Control ID** box and type a name and your initials for your run control. In this example, “General_Ledger_Summary_rp” is used as the Run Control ID. Click **Add**.

Note: This step is only necessary once. On subsequent reports, you can use the search feature on the “Find an Existing Value” to locate the Run Control ID created in this step. The underscore character should be used in place of spaces.

Specify the Report Parameters

The parameters required to run a report vary according the report you select. Parameters are shown in the **Report Request Parameters** area of the page. For example: Unit, Ledger Group and Dates are some of the parameters that you can use for this report. Then click the **Refresh** button.

Ledger Summary Report

Run Control ID General_Ledger_Summary_rp Report Manager Process Monitor

Language English

Report Request Parameters

Unit Ledger Currency Code

Fiscal Year To Period Date Code

ChartField Selection Personalize | Find | | First 1 of 1 Last


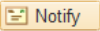

Sequence	ChartField Name	Include CF	Value
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>


Running Reports/Processes

Specify the Report Parameters (continued)

Some reports allow you to select Chartfields or Fund values that should be included in the report. In this example three Chartfields and a specific department are selected. Then click the **Save** button to save the settings you selected on this form. The next time you run this report using your new Run Control ID, these settings will appear.

Sequence	ChartField Name	Include CF	Value
1	Account	<input checked="" type="checkbox"/>	
2	Alternate Account	<input checked="" type="checkbox"/>	
3	Operating Unit	<input type="checkbox"/>	
4	Fund Code	<input type="checkbox"/>	
5	Department	<input checked="" type="checkbox"/>	110402199
6	Program Code	<input type="checkbox"/>	
7	Class Field	<input type="checkbox"/>	
8	Budget Reference	<input type="checkbox"/>	
9	Product	<input type="checkbox"/>	
10	Project	<input type="checkbox"/>	
11	Affiliate	<input type="checkbox"/>	
12	Fund Affiliate	<input type="checkbox"/>	
13	Operating Unit Affiliate	<input type="checkbox"/>	
14	Book Code	<input type="checkbox"/>	
15	Budget Period	<input type="checkbox"/>	



Return to the top of the page and click the **Run** button.

Ledger Summary Report

Run Control ID `General_Ledger_Summary_rp`
Language `English`

[Report Manager](#)

[Process Monitor](#)




PantherSoft

Running Reports/Processes

Process Scheduler Request


Process Scheduler Request ✕

User ID: rpanther Run Control ID: General_Ledger_Summary_rp

Server Name: PSUNX
 Recurrence: PSCDB
 Time Zone: PSNT
 Process List
 Select Description
 General Ledger Summary

Run Date: 08/18/2014 [X]
 Run Time: 4:00:45PM Reset to Current Date/Time

Process Name	Process Type	*Type	*Format	Distribution
GLS7003	SQR Report	Web	PDF	Distribution



The **Process Scheduler Request** screen will popup. The **Server Name** must be selected the first time the report is run. In this example **PSUNX** is used.

The **Description** section will vary depending on the process being run. At least one option in the description area must be highlighted; however, most processes/report will only have one option listed. If there is more than process/report option in the description area, you may select one or all of the options.

Click the **OK** button.

Process Instance Number

Every time a process runs, a unique instance number is assigned. The **Process Instance Number** shows the report/process has been initiated (e.g. 19611), and is running in the background. To check the status, click on the **Process Monitor** hyperlink.

Ledger Summary Report

Run Control ID General_Ledger_Summary_rp Report Manager

Language English Process Monitor


Process Instance:19611

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Running Reports/Processes

Retrieve the Report

Click the **Refresh** button until the **Run Status** is “Success” and the **Distribution Status** is “Posted”.

Process List | Server List

View Process Request For

User ID: rpanther | Type: | Last: | 1 Days | Refresh

Server: | Name: | Instance: | to: |

Run Status: | Distribution Status: | Save On Refresh

Process List Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	19611		SQR Report	GLS7003	rpanther	08/18/2014 4:15:27PM PDT	Success	Posted	Details

Go back to General Ledger Summary

Save Notify

The different Run and Distribution Statuses are:

Run Status	Description
Queued	The process is waiting to run.
Initiated	The process has started.
Processing	The process is running.
No Success	The process did not run. Make sure the report parameters are correct. See if you can retrieve the report, if not, call the Help Desk.
Warning	The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.
Success	The process ran successfully

Distribution Status	Description
Queued	The process is waiting to run.
NA	The process is still running.
Posted	The report has posted.
Not Posted	The report did not post. Make sure the correct server is selected from the Process Scheduler Request page, or call the Help Desk.

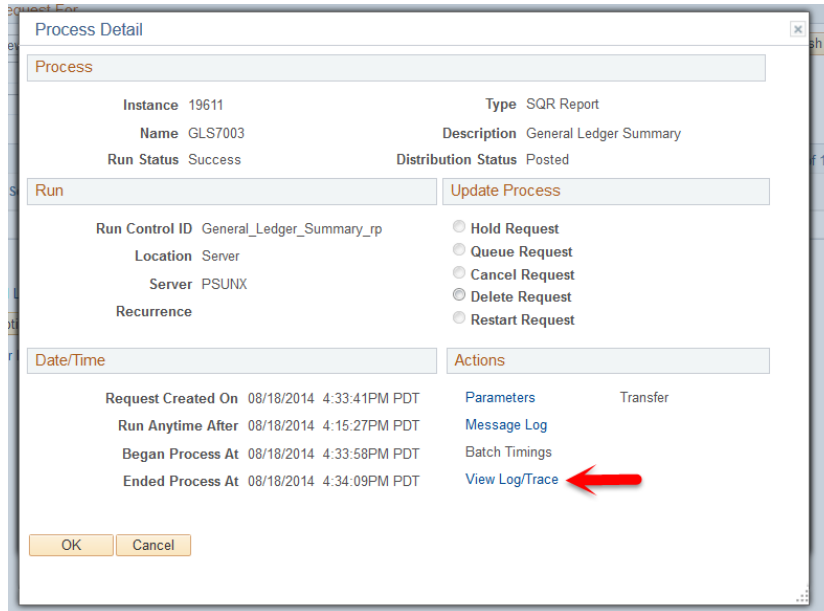
Once the statuses are Success and Posted, click on the **Details** hyperlink to view the report results.

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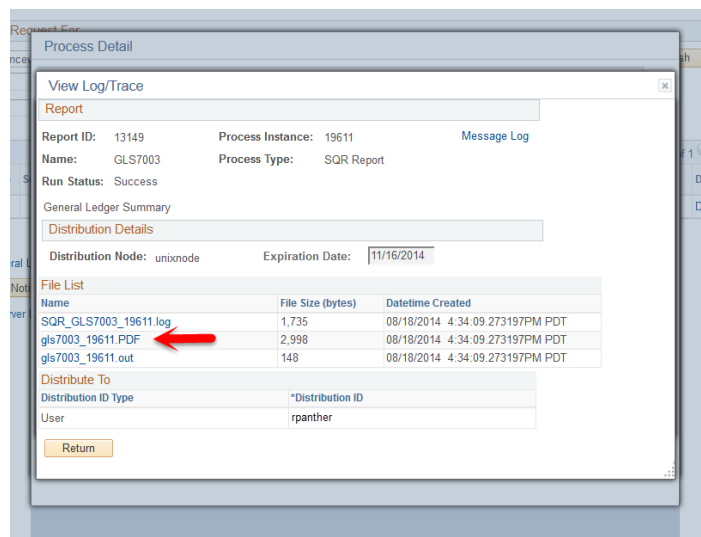
Running Reports/Processes

Retrieve the Report (continued)

The **Process Detail** page appears. All reports are located on the **View/Log Trace** page.



In the **View Log/Trace** window, the **File List** section contains the output file format selected in **Process Scheduler Request** above. In our example, the **.PDF** output file format was selected. Click on the file name to view the report results.



A new window opens to display the PDF report. It can now be saved or printed.